REVISION HISTORY			
Rev	Description of Change	Author	Effective Date
A	Original	JLA	O6/03/2003
1	Changed Reference Document Number	JLA	01/20/2004
2	Clarify Customer Acceptance	JLA	02/17/2004
3	Simplify procedure and delete redundant items.	RDB	02/21/2006

Purpose

This procedure describes the process that documents the customer requirements and expectations AMA-200 receives during a new training request.

Scope

This process systematically reviews each customer request and identifies those products that will be produced by AMA-200. The process then documents, plans and develops the product using standardized methodologies i.e. Academy Guidelines. The resulting product is verified and may be validated prior to delivery.

Responsibilities

The AMA-200 leadership team shall ensure that the Product Realization Process is followed for each customer request.

AMA-200 Leadership Team shall:

- Evaluate Documented Customer Request against established criteria.
- Accept the Customer Request Document.
- Reject Customer Requests with documented justification.
- Assign the Documented Customer Request to an Branch Manager.
- Assign the Project Coordinator.
- Approve the Draft Plan and plan changes.

Assigned Branch Manager shall be accountable for:

- Development of the Product.
- Development of the Project Overview Statement.
- The assignment of qualified personnel.
- Resolving issues throughout the project's life cycle.

Project Coordinator shall:

- Coordinate with the appropriate AMA-200 personnel, contractors, product lines and the customer.
- Develop the Draft Plan.
- Execute the Plan.
- Communicate project status.
- Incorporate all changes to the plan.
- Finalize the Product.
- Assure the customer formally accepts or rejects the product.
- Initiate the Post Delivery Process Review.
- Initiate QCARs as required.

Procedure

The Product Realization Process begins with a documented customer request. The Customer Request Information Document QF-214, is a three-part form.

Customer Request – Part A

Part A is jointly completed by the customer and a member of the Leadership Team. It is used to record information regarding a request for a new training product. The form is designed to be narrative and asks basic questions about the customer, what is expected from AMA-200, and what will meet or exceed the customer's expectations. It is critical that as much information as possible be obtained during the discussion of the request for training development.

Evaluation of the Customer Request – Part B

The Leadership Team shall evaluate the Customer Request by completing Part B of the Customer Request Document. This evaluation shall address the following objective criteria:

- Customer/product requirements and expectations.
- Agreements (written or verbal).
- Project milestones, goals, and objectives.
- Required resources.
- Applicable statutes, regulations and standards.
- Project priority.
- Risk Assessment

The Evaluation of the Customer Request will result in one of the following two decisions:

1. Accepted/Mandated Customer Request is forwarded to the Assigned Branch Manager for disposition.
2. A rejected customer request is returned to the customer by the Leadership Team with written justification.

The summary at the end of the evaluation will be cut and pasted to the Project Overview Statement for planning guidance, and an Assigned Branch Manager and a Project Coordinator will be designated.

The Project Overview Statement (POS) – Part C

The Assigned Branch and the Project Coordinator should develop the POS.

The POS may, when applicable, serve as a workgroup charter.

The POS initiates the Develop Draft Plan process. It is designed to describe the scope and boundaries of the customer requirements (requested product) and to define the features and functions of the product. Additional Information should include:

- Necessary data from Evaluation of the Customer Request procedure.
- An estimate for project duration and cost.
- Expected delivery date of the product.
- Identified Stakeholders.
- Qualified personnel to develop the product.
- Any other information needed for the completion of a workgroup charter, if applicable.

The Project Coordinator shall initiate the Develop Draft Plan process once the POS is completed.

Develop Draft Plan

- The Project Coordinator shall develop the Draft Plan, incorporating the information from the POS. The Draft Plan process may include some or all of the identified project team members and will be developed in accordance with the Product Development Planning Work Instructions, WI 214.02
- The Project Coordinator shall forward the Draft Plan to the Assigned Branch Manager for Leadership Team approval. The appropriate Leadership Team member approves or rejects the Draft Plan.
- The rejected Draft Plan is returned to the point of nonconformance.
- The approved Plan is forwarded to the Project Coordinator and Project Team. The Plan initiates the Execute Plan process.

Execute Plan Procedure

The Project Coordinator shall brief the Project Team Members on deliverables, objectives, assignments, milestones, scope, due dates and other Plan requirements in accordance with the Execute Plan process.

The Project Team shall execute the Plan in accordance with WI 214.03.

- Verification
    - The Project Coordinator ensures verification of the product. Any deficiencies identified are returned to the point of nonconformance.
- Validation
    - The Project Coordinator shall ensure validation of the product, if required in the Plan. Any deficiencies identified are returned to the point of nonconformance.
- Finalization
    - The Project Coordinator shall ensure finalization of the product including:
        - A completed Customer Acceptance with any concessions/exceptions noted. This is normally indicated by a customer request to plan and enroll classes.
        - Resolution of any deficiencies identified during delivery.
        - Written justification in the event of customer rejection.
        - Initiate the Post Delivery Process Review.
    - The Project Coordinator shall assemble the Final Report, including:
        - Appropriate Forms.
        - Documented Customer Request
        - Evaluation of a Customer Request
        - Project Overview Statement
        - The Plan
        - Customer correspondence
        - Contractor correspondence
        - Plan Change requests (QF 214.04)
        - Verification and validation results
        - Copy of the Product
        - Customer Product Acceptance in the form of an E mail, Record of Telephone conversation, joint meeting minutes, etc.

Post-Delivery Process

The Project Coordinator shall convene a Post-Delivery Process Review, including:

- The assembly of process participants
- Review of the Final Report
- Identification process improvement opportunities
- Acknowledgements
- Lessons learned
- Formal closure

1. Metrics

The metrics for this procedure may include:

- The number of written customer requests that were received.
- The number of mandated requests.
- The number of customer requests that meet customer requirements/criteria.
- The number of customer requests not accepted.
- The number of projects that met the projected timelines.
- The number of times the product is returned to the point of nonconformance

Documents Implementing This Procedure

Verifying Document Type or Number	Document Description
WI 214.02	Product Development Planning Work Instructions
WI 214.03	Product Development Plan Execution Work Instructions
WI 214.04	Plan Change Request Work Instructions
QF 214	Customer Request Information Document
QF 214.03	Risk Worksheet
QF 214.04	Plan Change Request Form

2. Quality Records

Quality Records required for this document are listed in the table below. These records shall be maintained by a designated representative of the Leadership Team.

Verifying Document Type or Number	Title	Retention Time
QF 214	Customer Request Information Document	Five Years
QF 214.03	Risk Worksheet(s) when applicable	Five Years
QF 214.04	Plan Change Request	Five Years

Quality documents are found in Appendix 1 of the AMA-200 QM.